

Business Services Online Tutorial

How to use Internet Representative Payee (I623)

Introduction

Internet Representative Payee (I623) allows participating organizational Representative Payees the ability to complete the annual accounting SSA Form 623 online.

Step 1: To access Internet Representative Payee online service, point your browser to the Business services Online Welcome page www.ssa.gov/bsa/bsowelcome.htm

Step 2: Select the Login link on the BSO Welcome Page.

Step 3: After reading and agreeing to the Business Services Online Attestation page, select the 'I Accept' button.

Step 4: Type your Personal Identification Number (PIN) and password to access Business Services Online Home page.

(**Note:** You can only access this service with a PIN and password. You must also be an approved participant in this Proof of Concept program.)

Step 5: From the Business Services Online home page, select the 'Complete Form I623 Online' link.

Step 6: The Select Beneficiary page will display. Select a beneficiary from the list of recipients.

Step 7: The Use of Benefits page will display. Complete the form. This form contains the information found on the paper Form SSA 623:

Step 8: Select the 'Continue' button to continue to the next page or select the 'Prior Page' button to return to the Select Beneficiaries page.

If the response is 'Yes' that the beneficiary did not live alone, or with the same person, or the same institution

OR

If the response is 'Yes' that the representative payee did not decide how the money was to be spent or saved

OR

If the response is '0' that no money was saved,

THEN

the Type of Account/Title of Account web page will not be displayed and the Summary web page will be displayed with the responses to the questions answered on the previous web page.

Step 9: If the response indicated that money was saved, then the Type of Account/Title of Account Page will display. Enter the appropriate information for the two accounting questions.

Step 10: Select the 'Continue' button to advance to the Summary page or the 'Prior Page' button to return to the Use of Benefits web page.

Step 11: .The Summary Page will display. You can only view the information on this page.

Step 12: Select the 'Confirm and Sign' button to submit the form or the 'Edit' button to return to the Use of Benefits page.

Step 13: The Confirmation page will display.

Step 14: Select the 'Enter Another Report' button to enter information for another beneficiary or Select 'Logout' to exit.